



## **UNIT 20:** **DISCONNECTION SERVICE ORDERS**

---

### **Introduction**

A disconnection service order is issued when a customer fails to pay their bill and as a result, water service is suspended. To avoid being shut off or to restore service, there are a number of steps that must be completed by the CSR and the customer. This unit will explain the steps required to research what is owed to American Water to prevent a shutoff for non-payment if the customer calls prior to disconnect or to complete a reconnect service order once the disconnection service order has been worked. These call types will be worked during Emergency/After Hours periods.

SAP provides a guided process which will populate reconnect fees, availability of after hour options and liability scripting options to ensure all aspects of the reconnect service order are completed accurately.

### **Objectives**

At the end of this unit, you will be able to:

- Inform the customer what must be paid to either prevent a shut off for non-payment or to reconnect water service
- Become familiar with the various service order types that will be created when dealing with a reconnect situation
- Determine the established guidelines for creating a same-day or next-day reconnect service order
- Understand what must be done when a customer's water is shut off for past due sewer balances
- Determine if an account has been closed and final billed for non-payment
- Determine what must be paid depending on the status of the contract account

### **Key Terms**

The following new terms and concepts are presented in this unit:

- |                 |                     |                                 |
|-----------------|---------------------|---------------------------------|
| • Reconnect Fee | • Delinquent Amount | • Special Accounts              |
| • DMS           | • ONP               | • DNP                           |
| • OMS           | • Sewer Authority   | • Assistance Agency Information |
| • Pledge        | • Disconnect Notice | • After Hours Fees              |

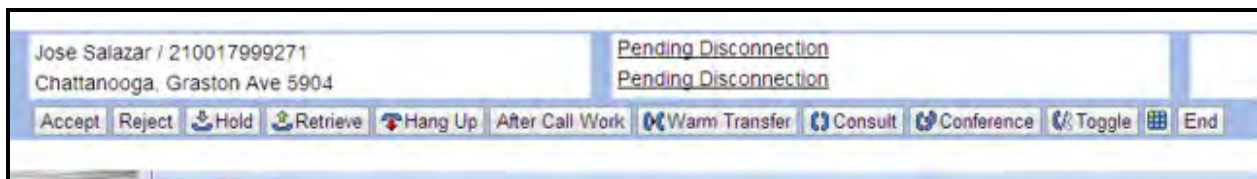
# UNIT 20:

## DISCONNECTION SERVICE ORDERS

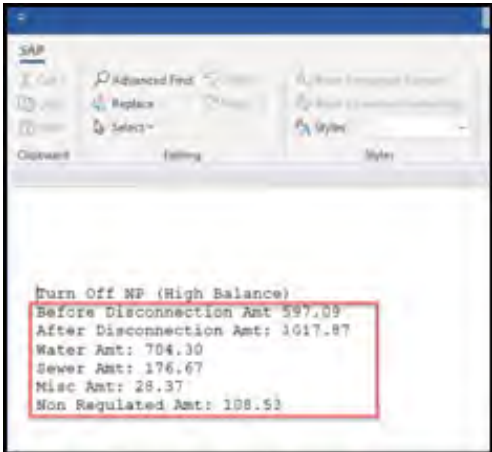
### I. Researching Shut Off for Non-Payment Situations

American Water has established specific guidelines that must be followed when a customer has been or is about to be shut off for non-payment. During the call, you are responsible for researching the customer's account and providing them with the required details to make a payment. You are also responsible for verifying the required payment amount has been made, recording that payment information and either creating a reconnect order or cancelling the pending disconnection service order.

If the disconnect order is still pending, the Status box will display a **Pending Disconnection** message.



To avoid disconnection, inform the customer of the total balance due, in the event they want to pay the entire amount, and the delinquent amount. When a disconnect for non-pay service order is generated on an account with an active Installment Plan, the service order comments will also list required amounts to be paid before and after disconnection.

Service Order Comments for Customer With Active Installment Plan	
	<p>Past Due IP Installments + <u>Unpaid Charges since IP Start Date</u> <b>Before Disconnect Amount</b></p> <p>Water Amount Sewer Amount Misc. Amount + <u>Non-Regulated Amount</u> <b>After Disconnection Amount</b></p>

Offer to process the payment over the phone if there is a stored payment method or transfer to the payment line. If the customer accepts, collecting a reconnect fee is not necessary because the water is still on. Once payment is received, cancel the pending disconnect service order if it did not auto-cancel.

## UNIT 20:

# DISCONNECTION SERVICE ORDERS

---

If the customer wishes to make their payment at a payment location, instruct the customer to make the payment **as soon as possible** to prevent disconnection. Ensure the customer has their 16-digit account number and quote any applicable reconnection fee in the event the order is worked before payment is made.

There is no need to instruct the customer to call back with receipt information once payment is made. The order will be cancelled automatically if it is still pending. If the order is completed, the customer will be required to call back with receipt information to verify payment and restore service.

# UNIT 20:

## DISCONNECTION SERVICE ORDERS



### Installment Plans and Pending Disconnection Service Orders

The standard process regarding installment plans and disconnect service orders is that you cannot offer a new installment plan once the disconnect order has been generated on an account.


**Remember, if you set the customer up on a new installment plan in this situation, you MUST cancel the disconnection order.** Some of our States have different rules regarding installment plans and disconnects orders, check IDA > State Specific Information or the Online Resource documents for state specific information.

### Payment Inquiries

Customers may call to inform you that service is about to be disconnected and only inquire as to the *minimum* amount they need to pay to prevent the shut off. There are many ways to access the amount required to prevent disconnection.


### Review the Disconnection Notice

*No Installment Plan on Account*

 <b>ILLINOIS AMERICAN WATER</b> <small>AMERICAN WATER, PO BOX 578, ALTON IL, 62002</small>			
<b>For Service To:</b> 1204 GARDEN ST ALTON, IL 62002-3704			
		<b>Account Number</b>	1025-220033330178
		<b>Pay Before</b>	08/14/2020
		<b>Total Due</b>	107.73
		08/03/2020	
<b>TIME SENSITIVE NOTICE:</b>			
To ensure timely receipt of your payment, please use one of the payment options noted below. Do not mail your payment.			
<b>SHANNA FLOWERS</b> 3204 BURTON ST ALTON, IL 62002-4740			
<b>IMPORTANT: FINAL DISCONNECTION NOTICE</b>			
Please read and take the steps needed to avoid your service from being disconnected.			
<b>PAY THIS AMOUNT</b>	<b>\$107.73</b>	<b>PRIOR TO</b>	<b>08/14/2020</b>
<b>Importante, este aviso impacta sus derechos y obligaciones y debe ser traducido de inmediato.</b>			
Payment on your water account is overdue. If you cannot pay the total amount due, you can automatically reinstate your installment plan by paying \$107.73 by the due date on this notice. If payment is not received, your service may be shut off on or after 08/14/2020. If your service is shut off, you may be required to pay the full amount due in order to restore services. Please use one of our convenient payment options listed below to ensure your payment is applied to your account immediately.			

# UNIT 20: DISCONNECTION SERVICE ORDERS

## Active Installment Plan on Account



**ILLINOIS  
AMERICAN WATER**  
AMERICAN WATER, PO BOX 578, ALTON IL, 62002

**For Service To:** 511 E PRAIRIE ST  
PONTIAC, IL 61764-2058

EARL EALY  
511 E PRAIRIE ST  
PONTIAC, IL 61764-2058

<b>Account Number</b>	1025-220033202600	08/03/2020
<b>Pay Before</b>	08/14/2020	
<b>Total Due</b>	121.19	

**TIME SENSITIVE NOTICE:**

To ensure timely receipt of your payment, please use one of the payment options noted below. Do not mail your payment.

IMPORTANT: FINAL DISCONNECTION NOTICE

Please read and take the steps needed to avoid your service from being disconnected.

<b>PAY THIS AMOUNT</b>	<b>\$121.19</b>	<b>PRIOR TO</b>	<b>08/14/2020</b>
<b>PAY THIS AMOUNT</b>	<b>\$129.20</b>	<b>ON OR AFTER</b>	<b>08/14/2020</b>

Importante, este aviso impacta sus derechos y obligaciones y debe ser traducido de inmediato.

Payment on your water account is overdue. If you cannot pay the total amount due, you can automatically reinstate your installment plan by paying \$121.19 by the due date on this notice. If payment is not received, your service may be shut off on or after 08/14/2020. If your service is shut off, you may be required to pay the full amount due in order to restore services. Please use one of our convenient payment options listed below to ensure your payment is applied to your account immediately.

## Account Overview

**Additional Information**
Account Balance | Locks | Payment List
Last Interactions | Correspondence

Filter by Infotype: All Items

Text	Infotype
Last Collection Activity from 07/31/17 - Disconnection Document & Service Order - Total Amou...	Dunning Notice
Last Payment of 08/03/17 for 371.49 USD - 371.49 USD Assigned	Payment

**Note History** | Last Interaction

Return to Current Interaction R

Date
08/11/2017 14:55:16
08/07/2017 14:56:59
08/04/2017 09:31:06
08/03/2017 16:45:26
08/03/2017 13:56:30
08/03/2017 13:33:37

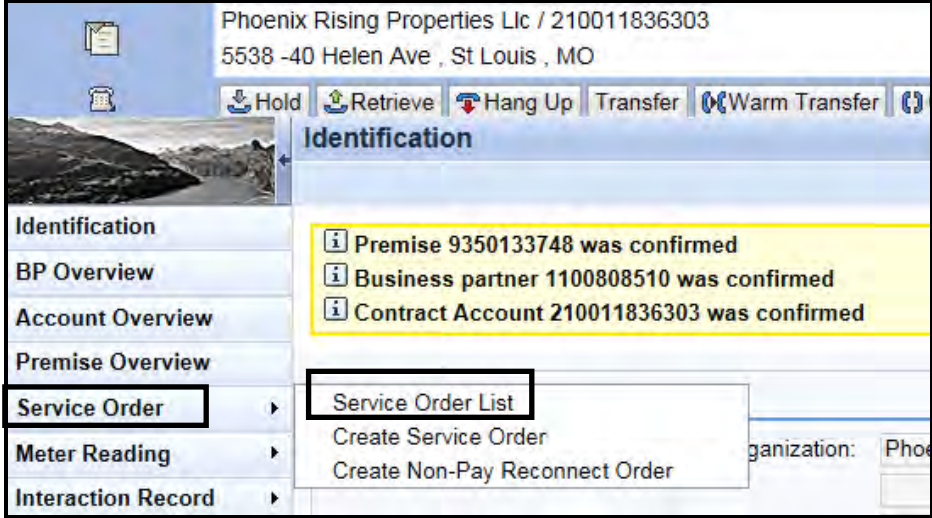
# UNIT 20:

## DISCONNECTION SERVICE ORDERS

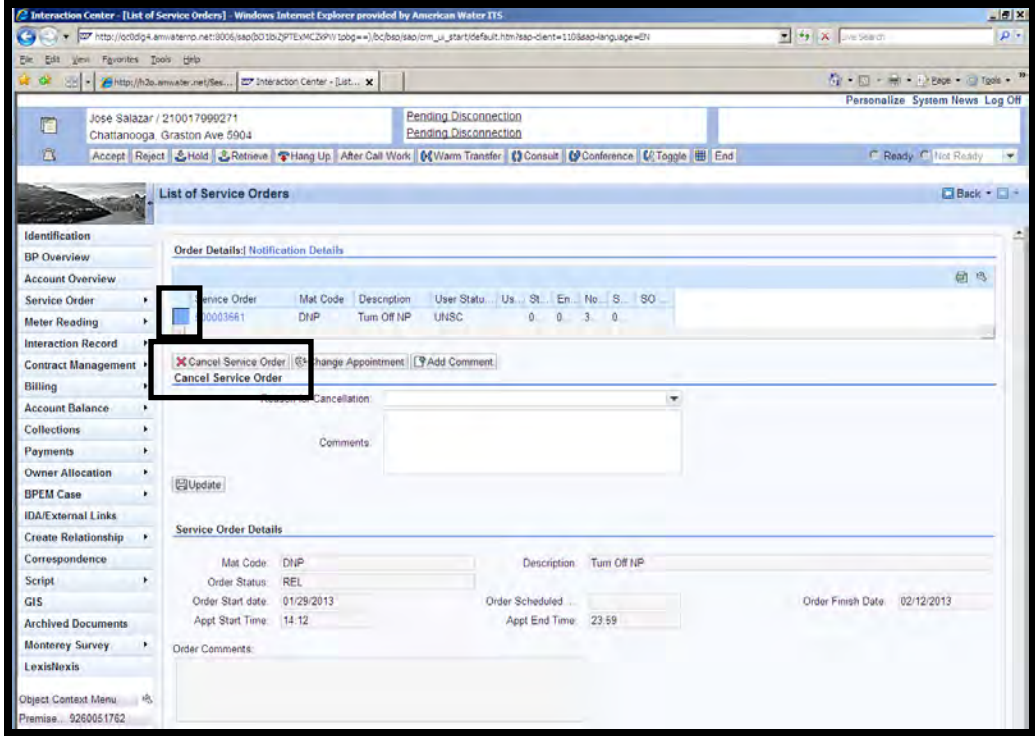
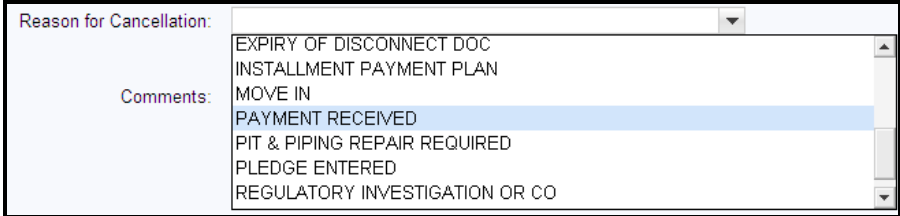


### Cancelling a Pending Disconnection Service Order

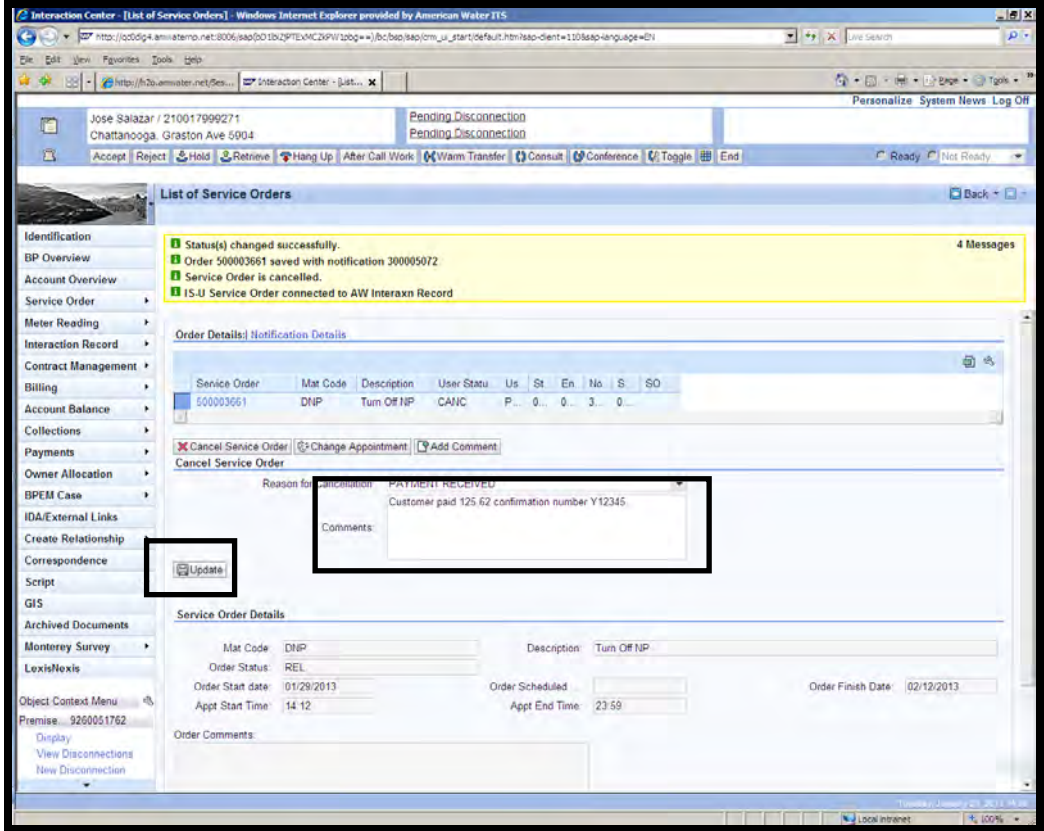
If the customer pays the amount with you and the disconnect order is still open, cancel the pending disconnection service order.

Step	Description
1.	Determine the amount that the customer must pay to prevent shut off and verify the disconnect order to determine if the water will be shut off for water or sewer.  If the customer has made a payment at a payment location, verify the receipt is valid.
2.	If the customer does have a stored payment method, process the payment.  If the customer does not have a stored payment method, enter the payment amount in Paymentus and transfer the call to the Paymentus payment line (7228).  Watch as the payment processes to ensure the payment is accepted.
3.	Click the <b>Service Order</b> menu. Select the <b>Service Order List</b> fly out.  



Step	Description
4.	<p>Select the order and click <b>Cancel Service Order</b>.</p> 
5.	<p>Select the reason for the cancellation from the drop down menu.</p> 

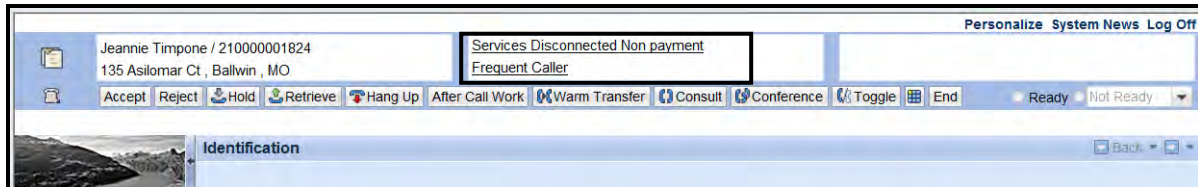
# UNIT 20: DISCONNECTION SERVICE ORDERS

Step	Description
6.	<p>Add payment amount and receipt information in the comments box. Click <b>Update</b>.</p>  <p>The screenshot shows the 'Interaction Center - [List of Service Orders]' window. A yellow message box at the top states: 'Status(s) changed successfully. Order 500003661 saved with notification 300005072. Service Order is cancelled. IS-U Service Order connected to AW Interactx Record'. Below this, the 'Order Details: Notification Details' section shows a table with columns: Service Order, Mat Code, Description, User Status, Us, St, En, No, S, SO. The row for Service Order 500003661 shows Mat Code DNP, Description Turn Off H/P, User Status CANC, and other fields. Below the table are buttons: Cancel Service Order, Change Appointment, Add Comment, and Cancel Service Order. The 'Comments' field is highlighted with a red box and contains the text: 'Customer paid 125.62 confirmation number Y12345'. The 'Update' button is also highlighted with a red box.</p>
7.	<p>Click <b>Interaction Record</b>. Select <b>IR Class</b> Collections and <b>IR Action</b> Disconnection Doc SvcOrder Updated/Cancelled. Enter comments regarding the call. Click <b>Save</b>.</p>



### Disconnection Service Order Completed

If an account has been **disconnected for non-payment**, an alert will appear in the Status Box. When a customer is disconnected for non-payment, and the account is still active, follow the process below.



The process at this point is to inform the customer what needs to be paid to get their water service restored:

- Review the account and provide the **delinquent amount** listed on the notice and service order comments and quote any applicable **reconnect fees**)

Inform the customer that you can either process their payment if there is a stored payment method, transfer the customer to our payment line, or provide them with a payment location. Once payment is made at a payment location, they can call back to restore service with their receipt number as soon as possible. Verify the receipt using **IDA > Receipts and Payments**.

For added convenience, if the customer intends to pay their **entire balance**, they may make their payment and schedule the reconnect order themselves through myWater. The order will be scheduled for the **next day regardless of the time** they make their payment.

### Returned Payments

If a customer writes American Water a check to restore water service and the payment is returned for insufficient funds, we will shut their water off again. After the customer is shut off for the second time, we will require them to pay the delinquent amount along with the associated NSF fee and reconnect fee and consider them a “cash only” customer. The only form of payment that **will not** be accepted once they are “cash only” is an electronic or personal check.

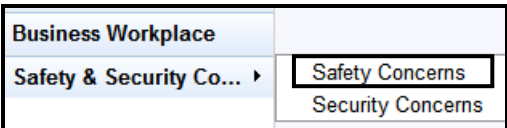
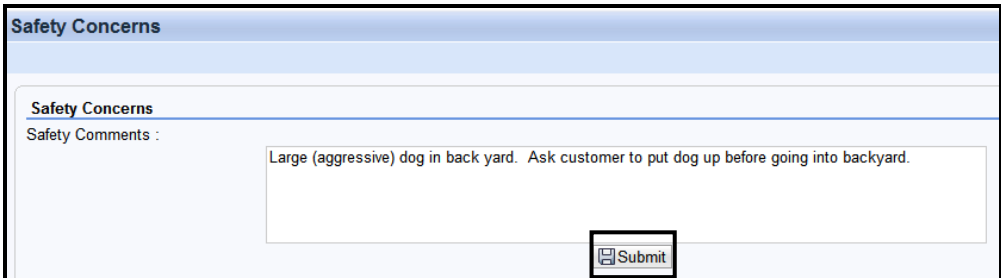
# UNIT 20:

## DISCONNECTION SERVICE ORDERS



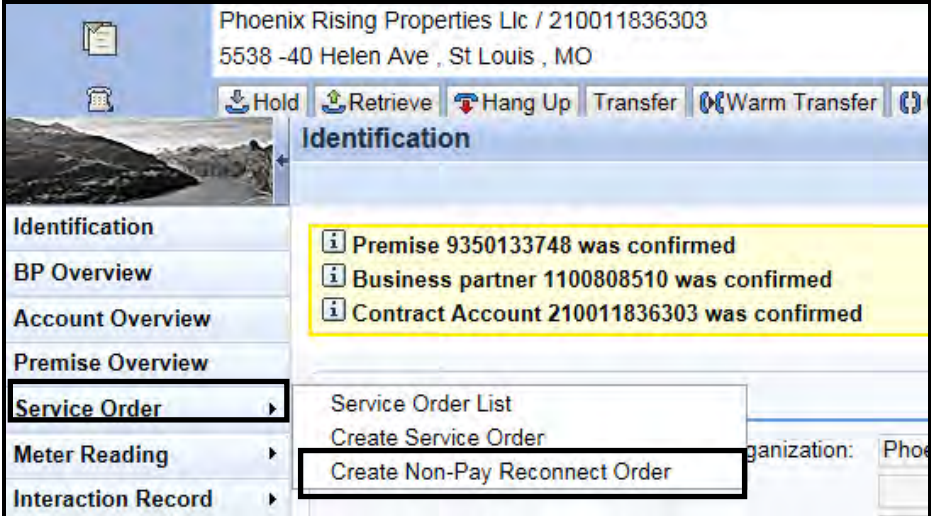
### Creating a Reconnection Service Order Procedure

The process to issue the reconnect order is a guided process.

Step	Description
1.	Research the account to determine what must be paid and if a reconnect fee should be charged or billed. Ensure the shut off order is for water and not sewer.
2.	Process the customer's payment if there is a stored payment method. If they do not have a stored method and the customer wants to make the payment, complete the steps below prior to transfer to the payment line.
3.	<p>Ask the customer if there are any pets we need to be made aware of and log the Safety Concern if there is one.</p> <p><b><i>"To ensure everyone's safety, please make sure all animals are restrained or confined for this service appointment. Do you have any pets that our field service representative needs to be made aware of?"</i></b></p> <p>If the customer says yes, please respond:</p> <p><b><i>"Please make sure they are restrained or confined."</i></b></p> <p>Click <b>Safety &amp; Security</b> and select <b>Safety Concerns</b> from the fly-out.</p> 
4.	<p>Enter detailed safety concern(s) to include <b>Pets on Premise</b>. Click <b>Submit</b>.</p>  <p><b>Note:</b> Once notes are entered and submitted they cannot be updated in CRM.</p>

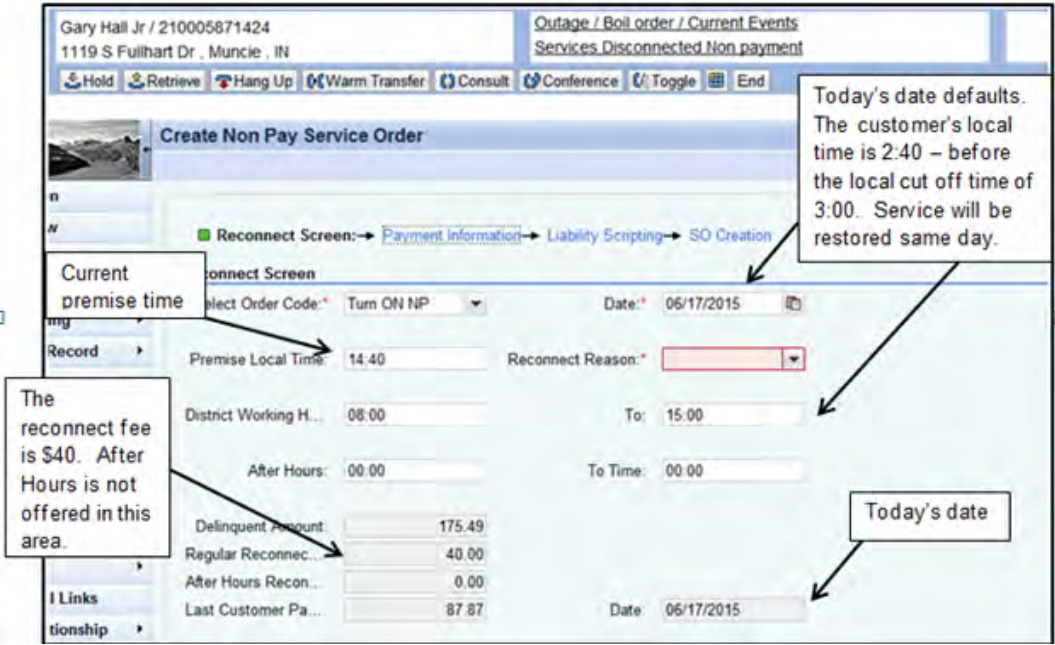
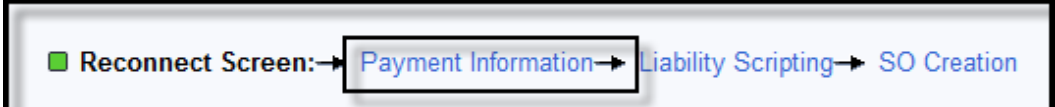
## UNIT 20:

# DISCONNECTION SERVICE ORDERS

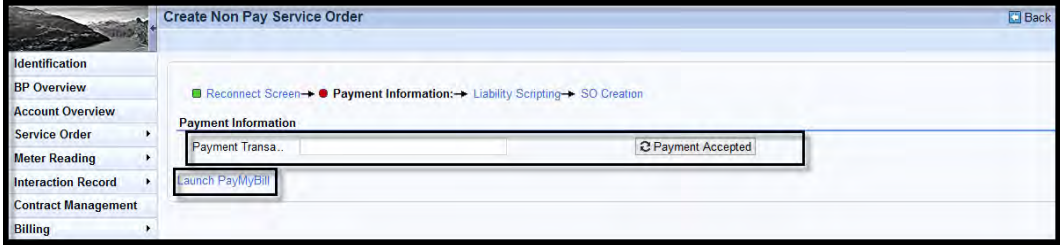
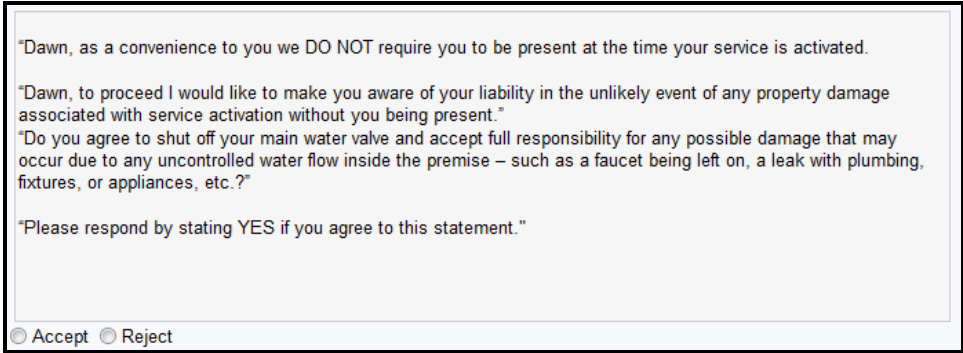

Step	Description
5.	<p>Click the <b>Service Order</b> menu. Select <b>Create Non-Pay Reconnect Order</b> from the fly out.</p> 

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

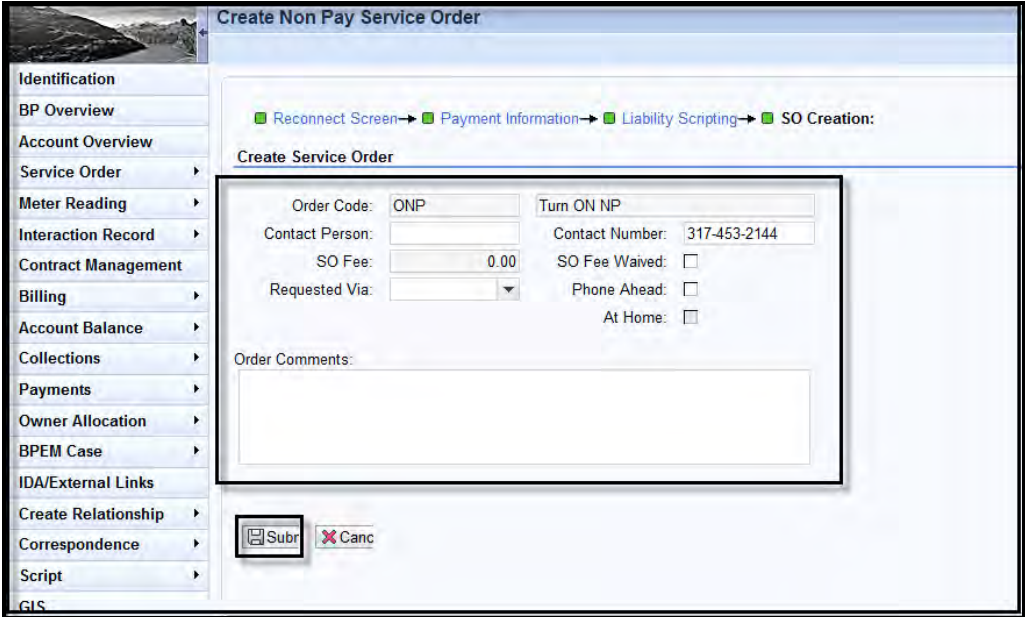
Step	Description
6.	<p>The <b>system</b> will select <b>Turn ON NP</b> (same day or next day).</p> <p>If after hours is offered, ask the customer if they would like to pay the after-hours fee and if they agree, select <b>Turn ON NP – After Hours</b> (After Hours same day).</p> <p>If a customer makes the payment and calls the CSC <b>before</b> their local cut off time, SAP will schedule the reconnect order for the same day (<b>Turn ON NP</b>).</p> <p>New York, Indiana, Virginia and West Virginia will attempt to restore service same day but have 24 hours to reconnect.</p> <p>If a customer makes the payment and calls the CSC <b>after</b> their local cut off time and there are <b>no</b> after-hours service available <b>or</b> the customer does not want to pay the after hours fee, SAP will create the <b>Turn ON NP</b> order for the <u>next day</u>. The water service will be restored within 24 hours.</p> <p>If the customer calls <b>after</b> their local cut off time and after-hours service <b>is</b> available and the customer agrees to pay the after-hours fee, select the <b>Turn ON NP- After Hours</b> service order.</p> <p><b>Screen Note:</b> The <b>To</b> field indicates cutoff time, Delinquent Amount is the minimum the customer must pay to restore service, Regular Reconnect field is the reconnect fee, After Hours is the fee if after hours is offered and last customer payment will display the last amount the customer paid on the account.</p> 
7.	<p>Click the <b>Payment Information</b> link.</p> 

# UNIT 20: DISCONNECTION SERVICE ORDERS

Step	Description
8.	<p>Enter the receipt information or confirmation number in the <b>Payment Transaction</b> box. Click <b>Payment Accepted</b>.</p> 
9.	<p>Click <b>Liability Scripting</b> once payment has been processed / verified. Depending on what is displayed, advise the customer that they: Must accept liability scripting for unattended service activation.</p> <p><b>Or</b></p> <p>Must be present for service activation.</p> 
10.	<p>Click <b>SO Creation</b>.</p> 

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

Step	Description
11.	<p>Enter in the following information:</p> <p>Contact Person – <b>Verify customer’s name (auto-populates)</b></p> <p>Contact Number – <b>Verify customer’s 10-digit phone number where they can be reached on the day of service. (auto-populates)</b></p> <p>Requested Via – <b>Telephone.</b></p> <p>At Home – <b>Click the box if the customer will be at the premise (if applicable).</b></p> <p>SO Fee Waived – <b>Place a check in the box if reconnect fees are to be waived per Supervisor approval or State Tariff.</b></p> <p>Order Comments <b>Payment and liability acceptance will auto-populate.</b> Add any additional comments that you feel may be of importance, normally nothing else is required.</p> <p><b>If you did not process the payment, do not press submit until the payment is processed.</b> Access Paymentus and enter the amount the customer has agreed to pay, transfer the call to 7228 and ensure the payment processes successfully.</p> <p><b><i>If you processed the payment or watched the payment process successfully, click Submit.</i></b></p> 
12.	<p>Select an IR Class Collections and IR Action Receipt/Confirmation Received or Make a Payment (depending on the circumstance). Enter comments regarding the call. Click <b>Save.</b></p>



## Medical Certificates and Disconnection Service Orders

If a customer states that they have a medical condition that necessitates water, you **MUST** advise the customer to send in a medical certificate signed by their doctor or nurse practitioner with all pertinent account information (customer's name, account number, phone number, relationship to the patient). The letter must include a statement that indicates that the medical condition will be aggravated without water. There is a medical certificate letter that can be sent via StreamServe or the customer can contact the doctor and have this information sent on his/her letterhead or prescription pad. This document can be emailed, faxed, or mailed to American Water.

If the disconnection order is open, check **IDA > State Specific Info > Med Cert** to see if the shut off order should be cancelled prior to receiving the medical documentation.

**Note:** Most states have placed a limit on medical certificates to two per rolling year. Please check **Account Overview > Locks** or **Account Balance > Locks and Exemptions** to determine how many medical certificates the customer has had in the last year from the date of the call. Additionally, check IDA for any updates to state specific guidelines. If the customer is eligible for a medical certificate, place the account on a 10-day **dunning/medical certificate documentation** lock.

After the med cert is received and approved, the lock will be changed to **dunning/medical certificate extension** by the fax processor for 30 or 60 days dependent upon state requirements.

## Automatic Payment Validation and Disconnection Order Cancellation

SAP can automatically validate a payment made by a customer that used the Paymentus web site, over the phone via the IVR (interactive voice response), or at a payment location against the delinquent amount due and will cancel any pending disconnection service order.

Service order comments will auto generate in the cancelled disconnect service order listing the vendor ID, the payment amount, receipt number, and date/time of the payment.

Delinquent amounts paid in **two or more installments will not cancel** the pending disconnection order. This is because the grand total of multiple payments is not recognized by the system.

In this instance, a call to the CSC would be necessary to stop the pending disconnection. For example, if the delinquent amount is \$150.00 and the customer pays \$100.00 on Tuesday morning and \$50.00 on Tuesday evening, the pending shut off order **will not** auto-cancel.

If the customer was not made aware of the need to call back, we would handle this as a company error, create the reconnection order, and waive any reconnect fees.

## Online Banking Bill Pay

Payments made through a customer's online banking will not prevent shutoff or restore service until the payment has posted to the customer's account. This also applies to payments mailed to us via USPS.

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

---



### Off for Non-Payment of Sewer

Customers may call to let you know that their service has already been shut off or that they have no water.

In SAP, a message **may or may not** appear in the status box of the Identification screen to alert you that an account has been disconnected for non-payment of sewer. To confirm an account has been shut off for nonpayment of sewer, access **Account Overview** or **Service Order > Service Order List**. The **DMS** order will be present if the customer is shut off for non-payment of sewer.

**Customers disconnected for nonpayment of sewer should be directed to contact their sewer authority to determine what needs to be paid.**

The sewer authorities are responsible for issuing the **DMS** (Turn Off Water NP Muni Sewer) disconnect order. Once the customer makes the necessary payment to the sewer authority, they send a data file containing the reconnect request and the **OMS** (Turn On Water NP Muni Sewer) reconnect orders are auto generated. The FSR completes the **OMS** service order.

If the FSR **cannot** complete the OMS service order the following occurs:

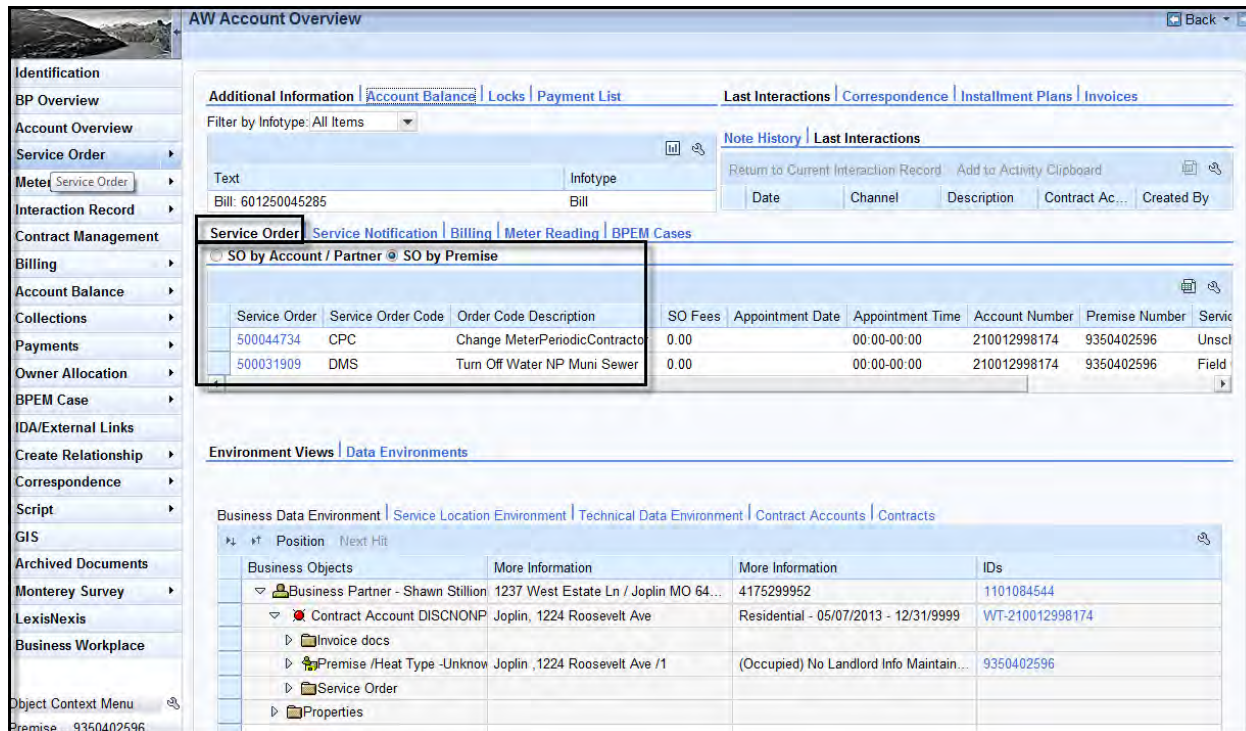
1. The order is marked as incomplete.
2. A door tag is left informing the customer to call the CSC to schedule another order.

Once the customer makes the required payment to the sewer authority, an **OMS** (Turn On Water NP Muni Sewer) is issued to reconnect the water. If a customer calls to report they paid the sewer authority and no OMS service order exists, or an incomplete was observed, research Interaction Record comments for notes indicating payment was made and that the premise is **released**. Search the Interaction Records by **premise number** for the release. There will be an **Other Issues/Municipality Inquiry** IR placed on the premise if a release has been received.

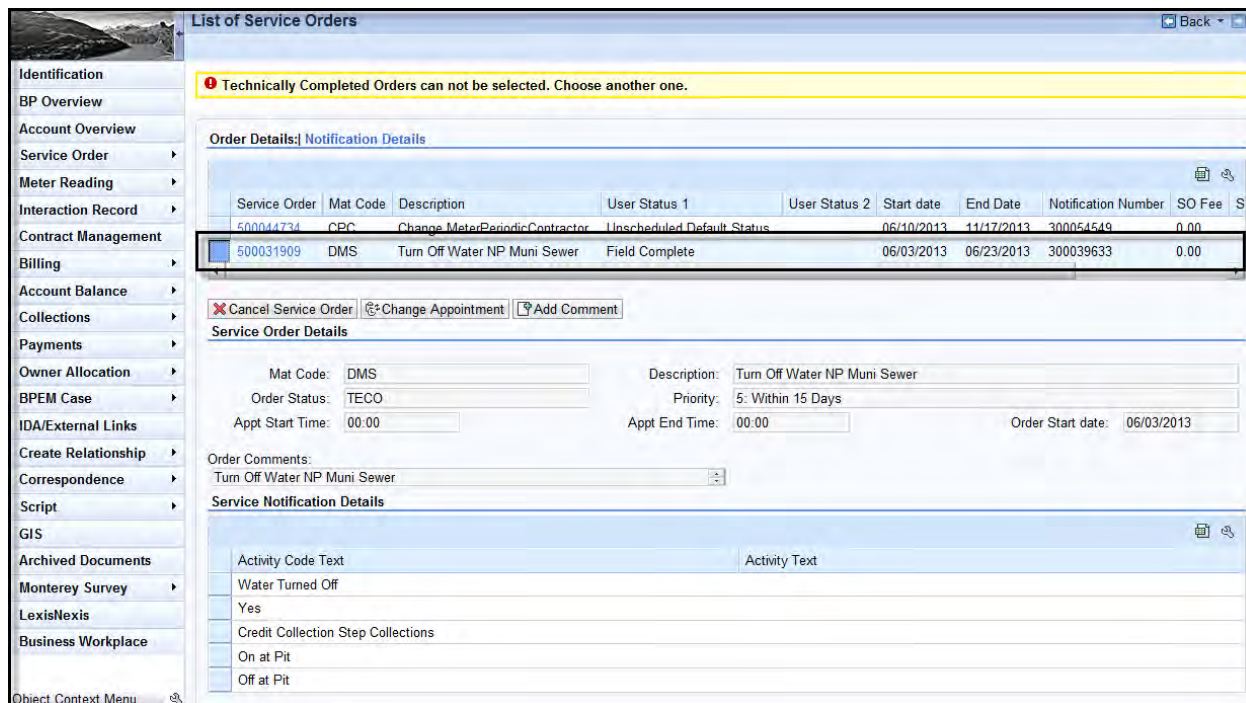
If notes on the account indicate the sewer authority has released the property, issue the **OMS** order. Service will be restored in 24 hours.

SAP programming does not allow for a customer to be disconnected for water and sewer at the same time.

## Account Overview



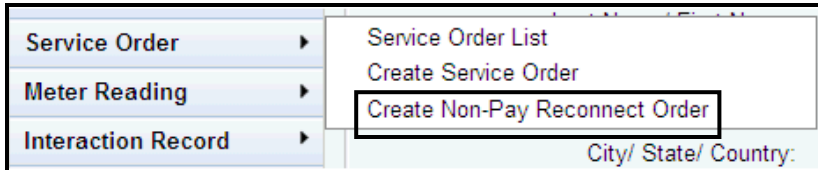
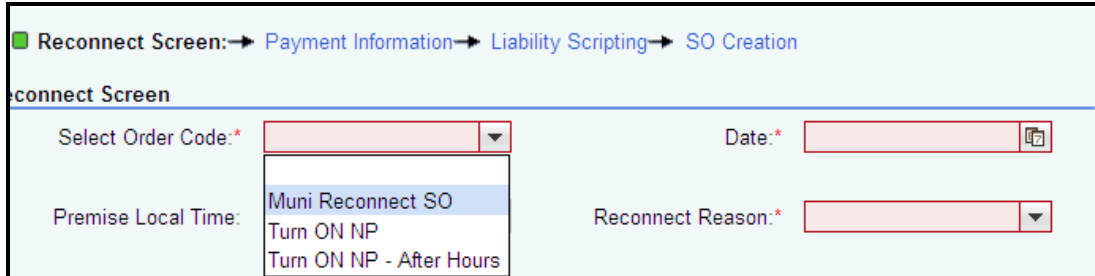
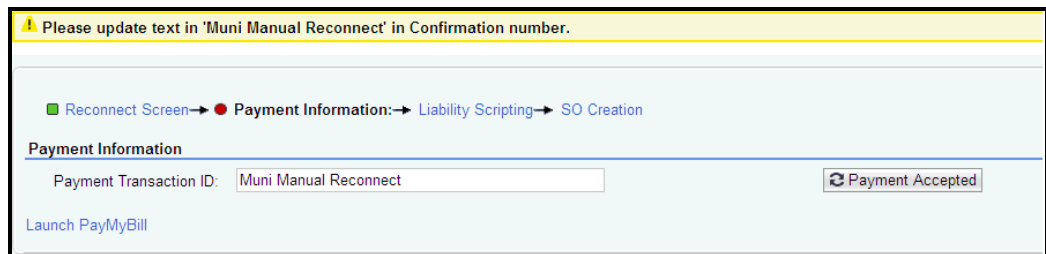
## Service Order > Service Order List



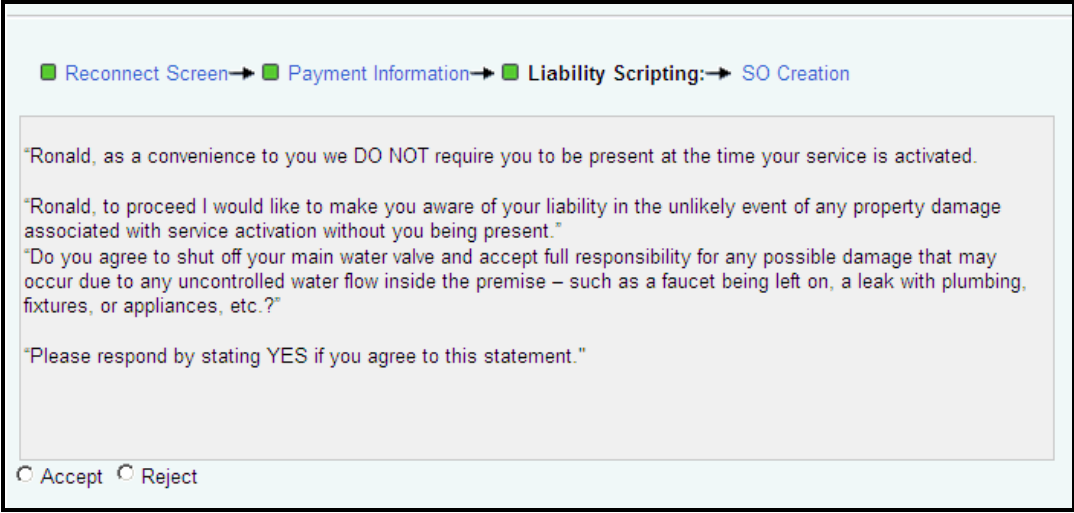
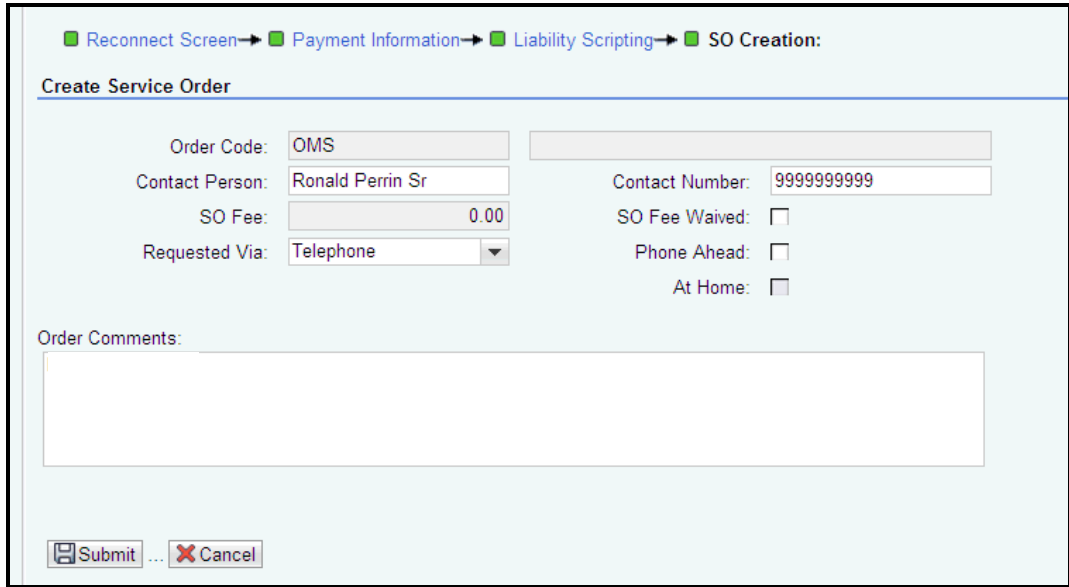
# UNIT 20:

## DISCONNECTION SERVICE ORDERS

When the customer calls the CSC to schedule the OMS order and the premise is released:

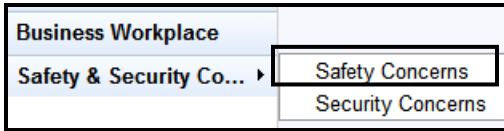
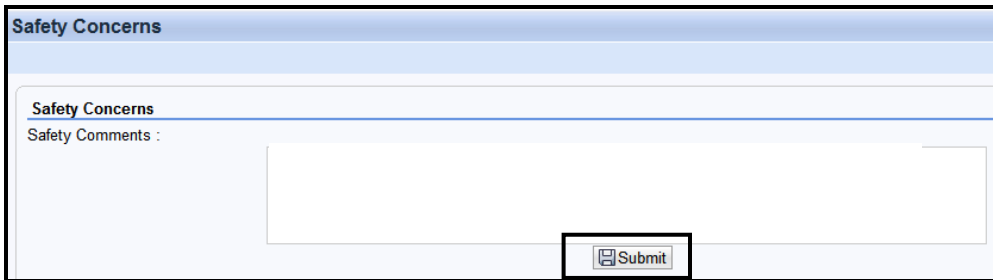
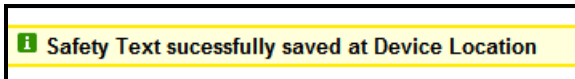
Step	Description
1.	Check <b>Interaction History</b> using the premise number for sewer release. Look for Class – <b>Other Issues</b> , Action – <b>Municipality Inquiry</b> .
2.	<p>If there is a release, navigate to Service Order&gt;Create Non-Pay Reconnect Order.</p> 
3.	<p>Select Muni Reconnect SO option, date, and the Reconnect Reason Reconnection Due to Full Payment.</p> 
4.	<p>Navigate to the Payment Information link and update the <b>Payment Transaction ID</b> field with <b>Muni Manual Reconnect</b> and click the Payment Accepted button. Note that this is stated in a message at the top of the screen.</p> 

# UNIT 20: DISCONNECTION SERVICE ORDERS

Step	Description
5.	<p>Provide Liability Scripting and mark the appropriate radio buttons.</p> 
6.	<p>Navigate to the SO Creation screen and fill out any additional details and click <b>Submit</b>.</p> <p>Ask:  <b><i>“Do you have any pets that our field service representative needs to be made aware of?”</i></b></p> <p>If the customer says yes, please respond:  <b><i>“Please make sure they are restrained or confined.”</i></b></p> 

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

Step	Description
7.	<p>If the customer responded yes to the pet question, complete steps 8 – 10. If not, proceed to step 10. Click <b>Safety &amp; Security</b> and select <b>Safety Concerns</b> from the fly-out.</p> 
8.	<p>Enter <b>"Pets on Premise"</b>. Click <b>Submit</b>.</p>  <p><b>Note:</b> Once notes are entered and submitted they cannot be updated in CRM.</p>
9.	<p>If saved successfully the following message appears:</p> 
10.	<p>Click <b>Interaction Record</b>. Select an <b>IR Class</b> and <b>IR Action</b>. Enter comments regarding the call. Click <b>Save</b>.</p>



### Issuing a Reconnect Service Order for a Non-Account Owner

Once the disconnect amount has been paid, we cannot continue to withhold service from the customer. This could result in the violation of State rules and regulations. If someone other than the account owner pays at least the delinquent amount plus any reconnect fees, schedule the Turn ON NP or the Turn ON NP – After Hours service order depending on what is available and what the caller has paid. If a customer calls stating that they want to make payment on behalf of an account holder to restore their water service and they are not aware of the amount required to do so, provide the caller with the collect amount and reconnect fee. Do not disclose the total balance on the account.

Please be sure to document the **caller's name and relationship**, if there is one. We are not required to speak with the account owner in order to issue the reconnect service order. Depending on the service activation guideline requirements, if the caller cannot ensure everything in the home will be turned off, require someone at least 18 years of age to be present.

### Payment at an Unauthorized Payment Location

If a customer calls in with receipt information from a payment location that is not on our list of authorized payment locations and their water is off for non-payment, record their receipt information and create the appropriate reconnect service order.

### Reconnect Fee Billing

American Water cannot charge a fee that does not display on a bill. Therefore, the reconnect fee will appear on the customer's next periodic bill (even though the customer has already paid it except in areas where the reconnect fee is billed).

Should you receive a call from a customer asking why they were billed a reconnect fee in addition to paying the reconnect fee when their water service was restored, explain to the customer that the charge appears on their bill for accounting purposes.

# UNIT 20:

## DISCONNECTION SERVICE ORDERS



### Assistance Programs and Pledges

Programs are made available to provide assistance to our customers who have difficulty paying their water bill. These Assistance Programs are typically administered by outside agencies, such as the American Red Cross, Department of Health and Human Services, or Dollar Energy.

Customers who would like to request assistance should be referred to one of the screening agencies located in the **IDA/External Links**.

The processes associated with handling assistance programs include:

- Locating an agency for a customer
- Accepting a pledge on a customer's account
- Canceling termination scheduled on a customer's account
- Restoring service on a customer's account

In addition to providing pledge information over the phone, pledges can be emailed to [specialaccts@amwater.com](mailto:specialaccts@amwater.com) or faxed to 1-866-464-0232. Any pledges that come through during the weekend will not be processed until Monday or the next business day.

### Locating an Agency for a Customer

During a call, customers may request the name or number of an assistance agency. This information is located in **IDA/External Links**.

**Note:** If the name of the agency appears in red, the agency is out of funds and will not be able to assist the customer.

ILAWC - Sterling (District)	H2O (Help to Others)/Salvation Army 409 Avenue F Fall Sterling, IL 61081-3309	Phn: (815) 625-1622 <sup>(S)</sup>	Yes	The H2O (Help to Others) Program is an emergency assistance program created by Illinois American Water and The Salvation Army. The program helps provide supplemental funding to Illinois American Water customers who would otherwise have trouble paying their bill and be subject to service disconnection.
ILAWC - Peoria (District)	Helping Hands 1015 West McBean Street Peoria, IL 61605	Dorothy Information Referral Specialist Phn: (309) 674-7140 <sup>(S)</sup> Monday thru Friday 08:00 AM to 04:00 PM	No	Phone is manned 24/7 - Peoria County Residents only - sometimes has funds available - refers individuals to other agencies with funding
ILAWC - Lincoln (District)	Jefferson Street Christian Church 1700 North Jefferson Street Lincoln, IL 62656-1047	Rochelle Phn: (217) 732-9294 <sup>(S)</sup> Monday thru Friday 08:00 AM to 04:00 PM	Yes	6-8 Week Waiting List
ILAWC - Chicago Metro (District)	Joliet Township Office 51 North Des Plaines Joliet, IL 60432	Supervisor's Office Phn: (815) 726-4781 <sup>(S)</sup> Monday thru Friday 08:00 AM to 04:00 PM	Yes	Joliet customers only

### Accepting a Pledge on a Customer's Account

If you receive a call from a help agency offering a pledge towards a customer's account, take the following steps as it applies to your scenario:

Scenario	Action To Take
<ul style="list-style-type: none"> <li>Water is still on <u>AND</u></li> <li>Pledge from help agency (possibly combined with a customer's payment) is enough to cover shut off amount &amp; fees</li> </ul>	<ol style="list-style-type: none"> <li>Check <b>Service Order &gt; Service Order List</b> to make sure there is no pending disconnection order. If there <i>is</i> a pending shut off, <b>cancel it</b> and enter comments in S/O Comments explaining the situation.</li> <li>Enter the pledge on the account.</li> <li>Enter a 45 day <b>Calculate Interest/Late Payment Charge</b> Lock on the account to ensure no late charges are assessed.</li> <li>Note the agency name, agency employee name, agency phone number and pledge amount to be paid in Interaction Record Comments.</li> </ol> <p>The 45-day statistical credit period allows time for the agency's pledge to be received and posted to the customer's account. The statistical credit also prevents the account from entering into the dunning process.</p>
<ul style="list-style-type: none"> <li>Water is shut off <u>AND</u></li> <li>Pledge from help agency (possibly combined with a customer's payment) is enough to cover shut off amount &amp; fees</li> </ul>	<ol style="list-style-type: none"> <li>Issue the appropriate reconnect service order.</li> <li>Submit the pledge on the account.</li> <li>Enter a 45 day <b>Calculate Interest/Late Payment Charge</b> Lock on the account to ensure no late charges are assessed.</li> <li>Note the agency name, agency employee name, agency phone number and pledge amount to be paid in Interaction Record Comments.</li> </ol> <p>The 45-day statistical credit period allows time for the agency's pledge to be received and posted to the customer's account. The statistical credit also prevents the account from entering into the dunning process.</p>
<ul style="list-style-type: none"> <li>Water is on or off</li> <li>Pledge from help agency (possibly combined with a customer's payment) is <b>NOT</b> enough to cover shut off amount &amp; fees.</li> </ul>	<ol style="list-style-type: none"> <li>Submit the pledge on the account.</li> <li>Enter a 45 day <b>Late Calculate Interest/Late Payment Charge</b> Lock on the account to ensure no late charges are assessed.</li> <li>Note the agency name, agency employee name, agency phone number and pledge amount to be paid in Interaction Record Comments.</li> </ol>

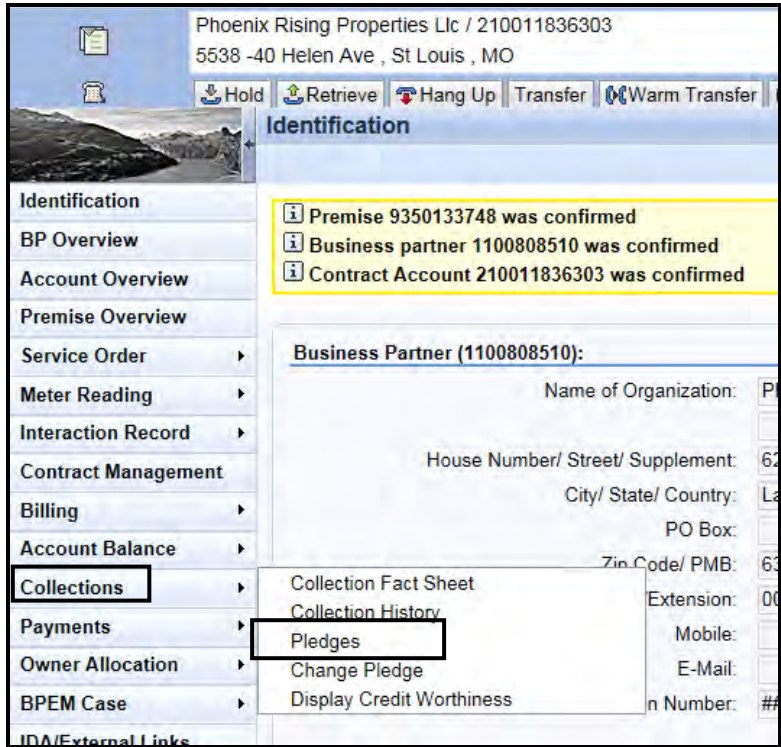
# UNIT 20:

## DISCONNECTION SERVICE ORDERS

One option our customers have to help them make payments on their utility bills is to enlist the aid of an assistance agency.

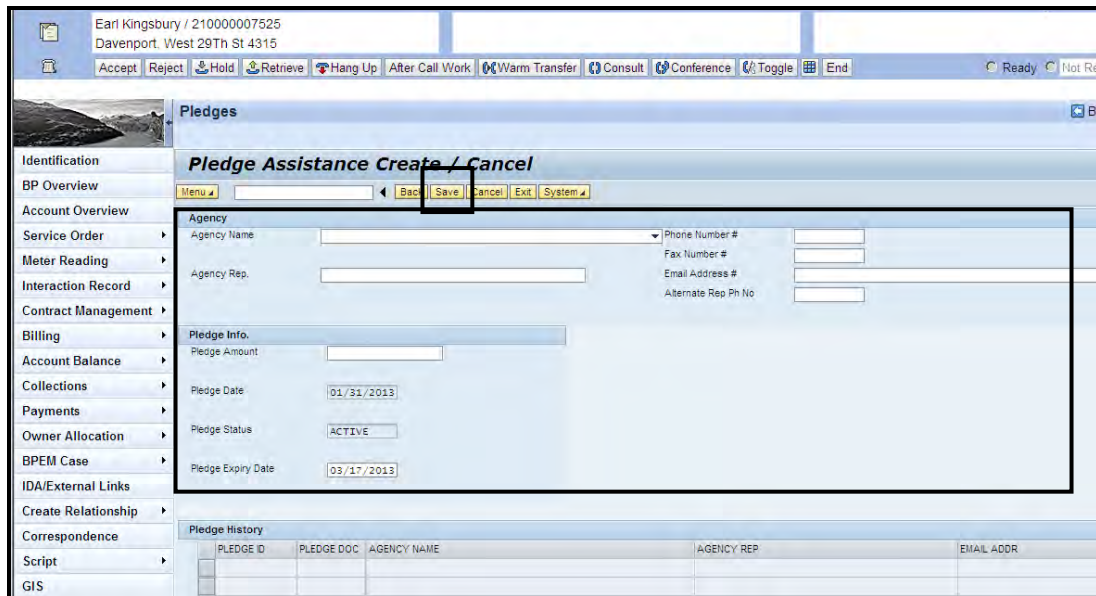
If you receive a call from an assistance or help agency offering a pledge towards a customer's account, take the following steps:

### Placing a Pledge on an Account Procedure

Step	Description
1.	<p>Click <b>Collections</b> menu and select <b>Pledges</b> from the fly out.</p>  <p>The screenshot shows the American Water customer portal interface. At the top, it displays the account information for 'Phoenix Rising Properties LLC / 210011836303' located at '5538 -40 Helen Ave, St Louis, MO'. Below this, there are buttons for 'Hold', 'Retrieve', 'Hang Up', 'Transfer', and 'Warm Transfer'. The 'Identification' section is highlighted, showing three confirmed items: 'Premise 9350133748 was confirmed', 'Business partner 1100808510 was confirmed', and 'Contract Account 210011836303 was confirmed'. The 'Business Partner (1100808510)' section is also visible, showing fields for 'Name of Organization', 'House Number/ Street/ Supplement', 'City/ State/ Country', 'PO Box', 'Zip Code/ PMB', 'Extension', 'Mobile', 'E-Mail', and 'Phone Number'. The 'Collections' menu is open, and the 'Pledges' option is selected.</p>

# UNIT 20: DISCONNECTION SERVICE ORDERS

Step	Description
2.	<p>Complete the following steps:</p> <ul style="list-style-type: none"> <li>• Select the <b>Agency Name</b> from the drop down.</li> <li>• Enter <b>Agency Rep</b> name.</li> <li>• Enter phone number, fax number (if available) and email address.</li> <li>• Enter the <b>Pledge Amount</b>.</li> <li>• Click <b>Save</b>.</li> </ul>



Earl Kingsbury / 210000007525  
Davenport, West 29Th St 4315

Accept Reject Hold Retrieve Hang Up After Call Work Warm Transfer Consult Conference Toggle End Ready Not Ready

Pledges

Identification

BP Overview

Account Overview

Service Order

Meter Reading

Interaction Record

Contract Management

Billing

Account Balance

Collections

Payments

Owner Allocation

BPEM Case

IDA/External Links

Create Relationship

Correspondence

Script

GIS

Pledge Assistance Create / Cancel

Menu

Agency

Agency Name

Agency Rep

Phone Number #

Fax Number #

Email Address #

Alternate Rep Ph No

Pledge Info

Pledge Amount

Pledge Date

Pledge Status


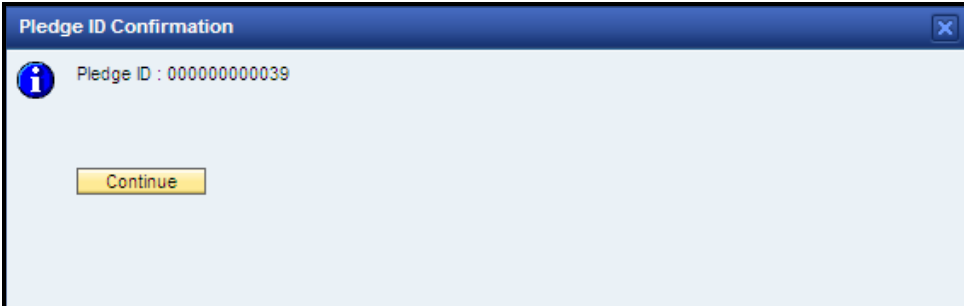
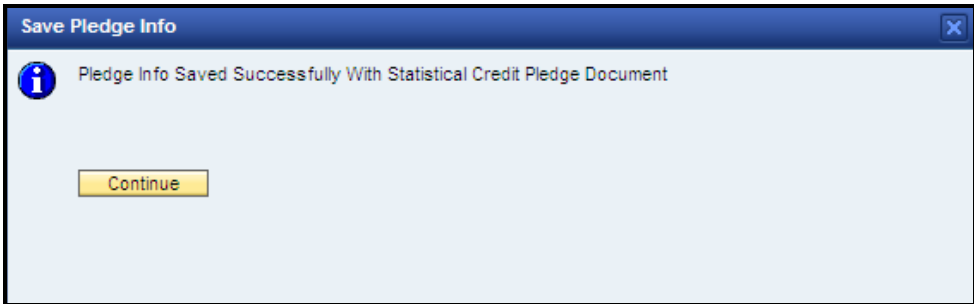
Pledge Expiry Date

Pledge History


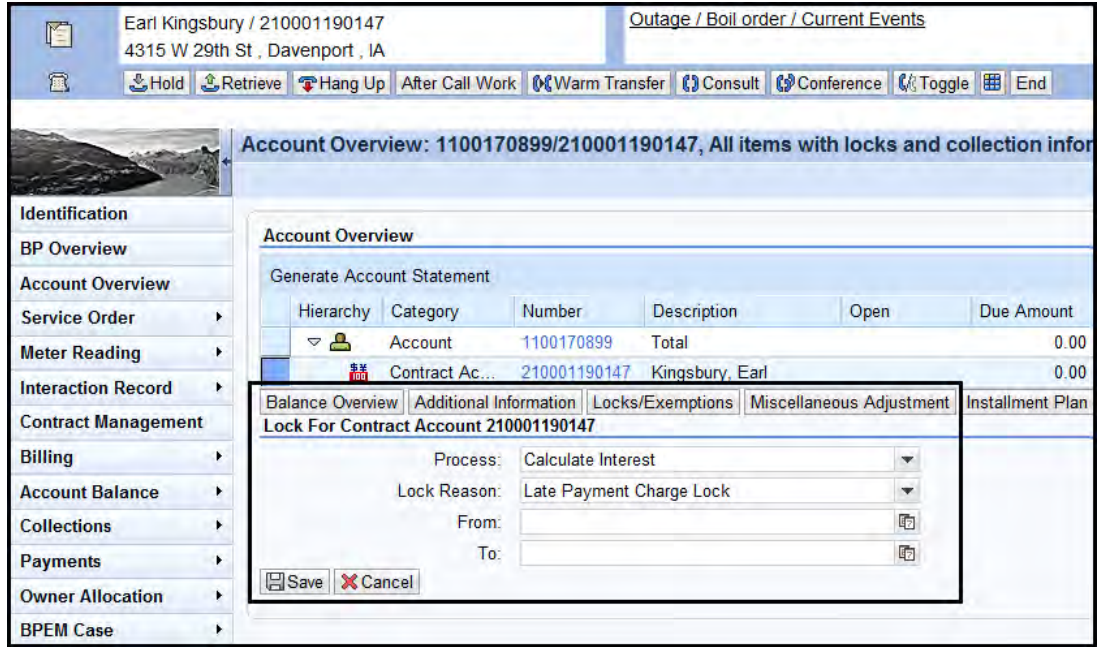
PLEDGE ID	PLEDGE DOC	AGENCY NAME	AGENCY REP	EMAIL ADDR

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

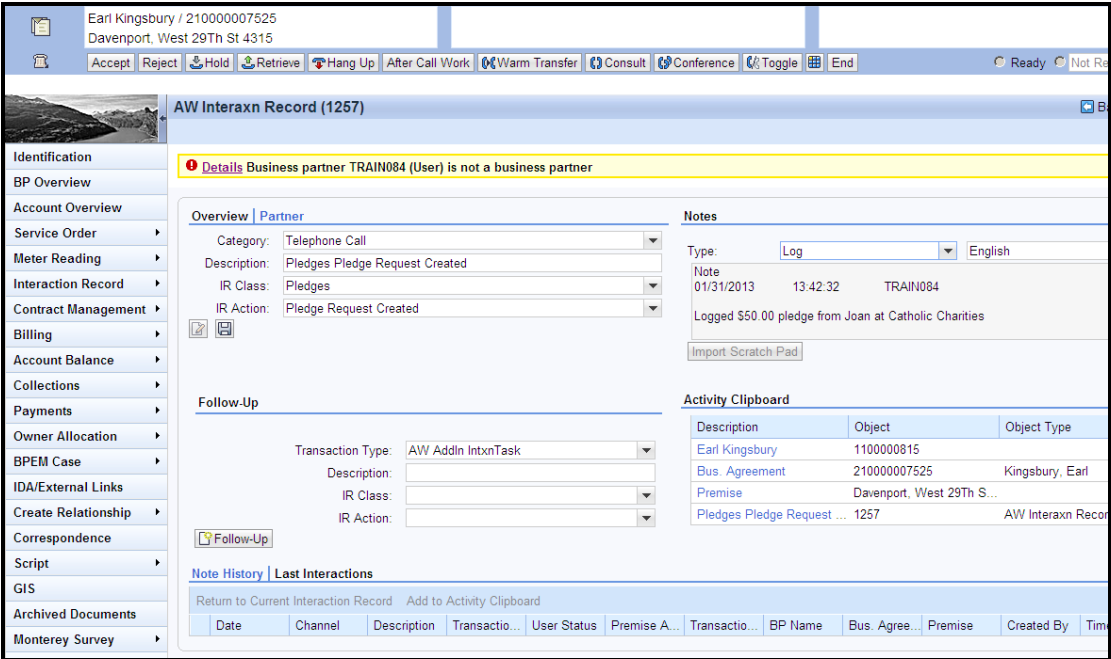
Step	Description
3.	<p>The following three dialog boxes appear.</p> <p>Click <b>Yes to Create Pledge</b>.</p>  <p>The 'Create Pledge' dialog box has a blue title bar with a close button. It contains a green question mark icon, the text 'Do you want to Create Pledge?', and two yellow buttons labeled 'Yes' and 'No'.</p> <p>Click <b>Continue</b>.</p>  <p>The 'Pledge ID Confirmation' dialog box has a blue title bar with a close button. It contains a blue information icon, the text 'Pledge ID : 000000000039', and a yellow button labeled 'Continue'.</p> <p>Click <b>Continue</b>.</p>  <p>The 'Save Pledge Info' dialog box has a blue title bar with a close button. It contains a blue information icon, the text 'Pledge Info Saved Successfully With Statistical Credit Pledge Document', and a yellow button labeled 'Continue'.</p>



Step	Description
4.	<p>The <b>Pledge History</b> section populates at the bottom of the screen.</p> 
5.	<p>Click <b>Account Balance</b> to place a lock on the account for 45 days to ensure late charges are not assessed.</p> <p>Choose <b>Process: Calculate Interest</b> and <b>Lock Reason: Late Payment Charge Lock</b>.</p> <p><b>Note:</b> Refer to the <b>Rates and Adjustments</b> unit for the complete procedure on entering a lock.</p> 

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

Step	Description
6.	<p>Click <b>Interaction Record</b>. Select the appropriate <b>IR Class</b> and <b>IR Action</b>. Enter comments regarding the call.</p>  <p>If there is a service order pending, <b>YOU MUST CANCEL IT</b> to prevent shut-off.</p>

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

### Pledge History

The Pledges fly-out from the Collections menu provides a summary of pledge information. Pledges can have one of four statuses listed below:

1. **Active** – Pledge has been received is still within the 45-day processing period.
2. **Reversed** – Pledge payment has been received and Reversal line item in account history will display to cancel out the pledge (Other Activities) line item.
3. **Cancelled** – Pledge payment was not received and is cancelled.
4. **Fulfilled** – Pledge payment has been received. Account history must be researched to confirm a Reversal line item has been submitted so the account reflects an accurate balance.

**Note:** There are times the reversal line item is delayed posting to the account causing the balance to be incorrect. Before quoting the balance always verify all three line items display.

### Pledge Example Continued:

Pledge History												
PLEDGE ID	PLEDGE DOC	AGENCY NAME	AGENCY REP	EMAIL ADDR	PHONE NO	FAX ...	PLEDGE AMT	AMOUNT PAID	CREDIT MEMO	D...	PLEDGE STA	PLEDGE EXP
9061	02/13/2014	GRANITE CITY	DENISE DAILY	123@ABC.COM	86-457-899	2589	23.06	0.00	514700023413		ACTIVE	03/30/2014
7717	01/13/2014	GRANITE CITY	MEGAN DALEY	123@ABC.COM	86-457-899	2589	23.71	0.00	509000018851		REVERSED	02/27/2014
6952	12/09/2013	GRANITE CITY	DENISE	123@ABC.COM	86-457-899	2589	27.14	0.00	510800011596		REVERSED	01/23/2014
5639	11/11/2013	OTHER	DENISE	123@ABC.COM	6188770513	2589	22.96	0.00	514700009863		REVERSED	12/26/2013
4612	10/10/2013	OTHER	GRANITE CITY		9999999999		3.85	0.00	509600006467		REVERSED	11/24/2013
3822	09/24/2013	GRANITE CITY	DENISE DAILY	123@ABC.COM	86-457-899	2589	3.85	0.00	507500005713		CANCELLED	11/08/2013
1808	08/09/2013	OTHER	DENISE DAILEY		6188770513		26.74	0.00	511700002401		REVERSED	09/23/2013
847	07/10/2013	GRANITE CITY	DENISE DALEY	123@ABC.COM	86-457-899	2589	22.91	0.00	514700001393		REVERSED	08/24/2013

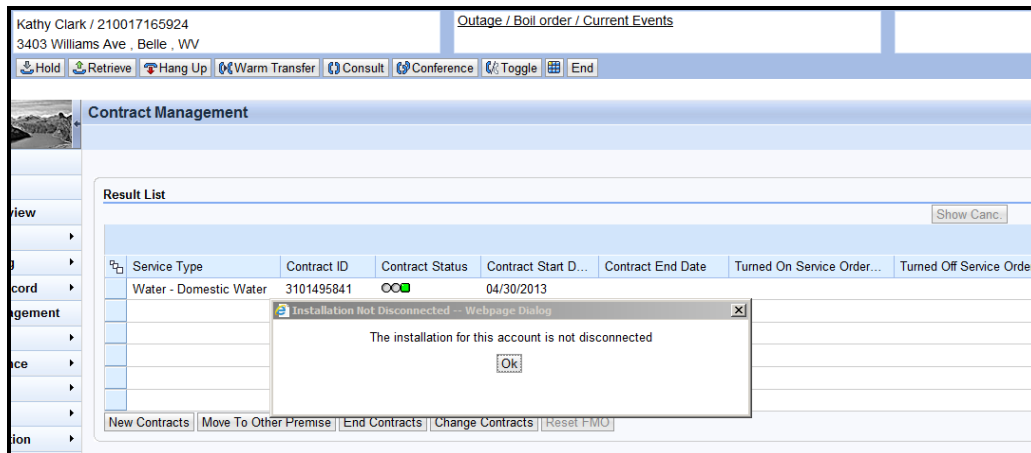
# UNIT 20:

## DISCONNECTION SERVICE ORDERS



### ONP – Installation Status Workaround

At times, when attempting to restore service after a DNP, the “Installation not Disconnected” error will pop up. This issue occurs for various reasons and the system will not allow an ONP to be created, as it is incorrectly recognizing that the water is still on.



### Workaround Procedure

- Issue an **RPO** service order through Service Order > Create Service Order and **DO NOT** select the device when issuing
- Include in service order comments that the system would not allow an ONP to be created
- In areas that offer After Hours, if the RPO is being used in the place of an ONP After Hours, include in the comments that the after-hours fee was quoted
- Click the “At Home” box if the customer will be present for service activation
- Create CS - Billing Follow UP BPEM to apply the reconnect fee or after-hours fee to the account.
- When the ‘Service Disconnected for Non Payment’ message displays in the Status box in error, send a **CS – Maintain TMD** BPEM with notes to change the installation status to active so that message is removed from the Status box.

## Summary

In this unit, you learned how to handle disconnection service orders. Key points from this unit include the following:

- Customer may be disconnected for non-payment of water and/or non-payment of sewer.
- Customers who are disconnected for non-payment or have a pending disconnect order must make a payment before the service can be restored or the disconnect order cancelled.
- Customers who are disconnected for non-payment of sewer (DMS) must contact the sewer authority to make arrangements. The sewer authority is responsible for issuing reconnect orders in these situations.
- Customers who are disconnected for non-payment of water should be referred to a payment location, transferred to the payment line, or the CSR can take the payment over the phone if there is a stored payment method.
- If the customer pays at an authorized payment location, the amount of the payment must be verified in IDA > Quick Link **Receipts and Payments** before a service order can be issued to restore service.
- The reconnect fee must be paid when the customer pays the delinquent amount before the reconnect order is issued in most states.
- To have service restored the same day the customer must contact the CSC prior to their local cutoff time to get same day reconnect service. (Unless after-hour service is available, and the customer agrees to the after-hours fee).
- You must issue a reconnect service order to have the water service restored.
- If the customer calls back with payment information and the disconnection service order is still open, cancel the disconnection service order noting the payment information in the cancellation notes.

# UNIT 20:

## DISCONNECTION SERVICE ORDERS

---



### Disconnect Service Orders Study Guide

#### Terms

Please define each of the following terms. You may use any tool at your disposal.

No.	Definition
1.	Reconnection Fee
2.	Delinquent Amount
3.	DNP
4.	ONP
5.	After Hours Fee
6.	Sewer Authority
7.	Pledge
8.	DMS



# UNIT 20:

## DISCONNECTION SERVICE ORDERS

---

### Exploring the Objectives

Please expand on the following topics. You can use the space as you wish; entering notes during discussion or information gathered during your reading.

No.	Description
1.	How can you determine if the account was shut off for non-payment of water or sewer?
2.	Explain how to confirm the amount needed for reconnection or to prevent disconnect.
3.	What resource provides the reconnect fee and when must this fee be charged?
4.	What do you advise the customer to do after you have negotiated/determined the payment required for reconnection and they are not paying over the phone?
5.	When the customer calls back after making the payment, what information must be documented?
6.	What must be completed after a Move Out order is closed and the required amount has been paid?